

Total Workforce Management Services (TWMS) Quick User Guide

Ad-Hoc Reporter



Ad-Hoc Reporter - Summary

TWMS allows you to create and save your own reports using the Ad-Hoc Reporter module. There are four different 'subject areas' that you can use to generate your queries. They are:

- *Employee Information*
- *Training Information*
- *Civilian SF50 History*
- *Billet Information*

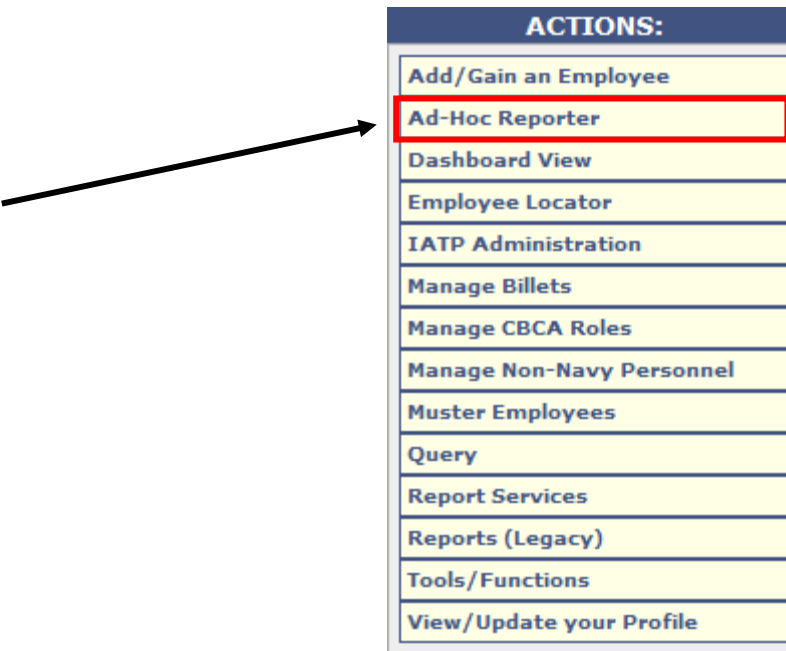
Access to the Ad-Hoc Reporter is restricted to those users who have had their request for the module approved. Contact your TWMS POC to request access. Your access level also determines which subject areas you will be able to get approval for. Some access levels will only be able to request one subject area, others may be able to request access to all of them.

Restrictions to PII data also apply when creating your own reports. If you do not have access to PII data in your TWMS profile then you will also not be able to choose those restricted fields when creating your reports.

Accessing the Ad-Hoc Reporter

To access the Ad-Hoc Reporter module in TWMS*:

1. From the Home Page click on the **Ad-Hoc Reporter** button on the Actions Menu.



ACTIONS:
Add/Gain an Employee
Ad-Hoc Reporter
Dashboard View
Employee Locator
IATP Administration
Manage Billets
Manage CBCA Roles
Manage Non-Navy Personnel
Muster Employees
Query
Report Services
Reports (Legacy)
Tools/Functions
View/Update your Profile

**You must have the appropriate permissions to obtain access to the Ad-Hoc module.*

Accessing the Ad-Hoc Reporter

The Ad-Hoc Reporter Main Window will open displaying two available options.

TWMS - Query & Reporter

USER: DEMO, MANAGER

To begin, select one of the choices below:

☒ **Create an Ad-Hoc report**
Use this option if you want to create an ad-hoc report that can be saved as a template for later use

☐ **Use a previously-defined template**
Use this option if you want to use an ad-hoc report you have already created and named.

Select a subject area:

--- Select ---

Select a template

--- Create Query ---

Select UIC Type

☒ Use Assigned UIC ☐ Use Official UIC

[Save as template](#)

2a. The default option is to create a new ad-hoc report.

2b. If you want to use a previously-defined ad-hoc report then click this option.

Creating an Ad-Hoc Report

To create an ad-hoc report you will first choose the subject area that contains the information you are looking for. If applicable for the subject area, you will then select the employee type and employee status for your report. Next you will select the display fields you would like to see in your report. You can then identify and add any filters that you would like to apply to your report. Finally, you can sort the fields in any order that makes sense for your report.

To create a an ad-hoc report:

1. Click the dropdown arrow to choose the subject area you are interested in.

TWMS - Query & Reporter

USER: DEMO, MANAGER

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☐ **Use a previously-defined template**
Use this option if you want to use an ad-hoc report you have already created and named.

Select a subject area:

---- Select ----

---- Select ----

Billet Information

Civilian SF50 History

Employee Information

Training Information

Select a template

---- Create Query ----

Creating an Ad-Hoc Report

Once a subject area is chosen then several tabs will be available for you that will help guide you through creating your report. The tabs discussed here will be:

- *Employee Criteria*
- *Filter Criteria*
- *Display Columns*
- *Sort Columns*

2. Select the Assigned or Official UIC of the employees you want to create a report for. The default is the Assigned UIC.

These four tabs will be used to create your report.

The screenshot displays the 'TWMS - Query & Reporter' interface. At the top right, it shows 'USER: DEMO, MANAGER'. Below the header, a prompt says 'To begin, select one of the choices below:'. There are two main options: 'Create an Ad-Hoc report' (selected) and 'Use a previously-defined template'. The 'Create an Ad-Hoc report' section includes a 'Select a subject area:' dropdown menu with 'Employee Information' selected, and a 'Select UIC Type' section with 'Use Assigned UIC' selected and 'Use Official UIC' as an option. A red box highlights the 'Select UIC Type' section. Below this is a 'Save as Template' link. At the bottom, there is a row of four tabs: 'Instructions', 'Employee Criteria', 'Display Columns', 'Filter Criteria', and 'Sort Columns'. A red box highlights these four tabs. An arrow points from the text 'These four tabs will be used to create your report.' to the 'Employee Criteria' tab. Below the tabs is a 'Put Instructions here' text area. At the bottom, there is a 'Create Report' button and radio buttons for 'Excel' and 'HTML'.

3. Click the **Employee Criteria** tab.

Creating an Ad-Hoc Report

The Employee Criteria tab will let you select the employee type(s) and the employee status(es) that you would like to include in your report. By default, all employee types are selected as well as the Active-On Board and Active-On Temp Detail/Temp Prom employee statuses. You can select/deselect these as required for your report.

4. Select or deselect the employee types and statuses you would like included in your report.
- Note: Here we will only select Military-Active and Civilian-APF Employee Types. To do this we will deselect all the employee types that we don't want included. No changes will be made to the Employee Status*

The screenshot shows the 'Employee Criteria' tab in the Ad-Hoc Reporter. The 'Display Columns' sub-tab is highlighted. The 'Employee Type' list includes: MILITARY-ACTIVE (checked), MILITARY-RESERVIST (checked), MILITARY-NON-NAVY (checked), CIVILIAN-APF (checked), CIVILIAN-FND (checked), CIVILIAN-FNI (checked), CIVILIAN-NAF (checked), CIVILIAN-NAF-FND (checked), CIVILIAN-CONTRACTOR (checked), and CIVILIAN-NON-NAVY (checked). The 'Employee Status' list includes: Active - On Temp Detail/Temp Prom (checked), Active - On Board (checked), Active - On Deployment/TAD (unchecked), Active - On LWOP (unchecked), Active - On Terminal Leave (unchecked), Inactive/Separated (unchecked), Prospective Gain/Transfer (unchecked), and Prospective Loss (unchecked). At the bottom, there is a 'Create Report' button and radio buttons for 'Excel' and 'HTML'.

5. Click the **Display Columns** tab.

Creating an Ad-Hoc Report

The Display Columns tab will let you select the fields related to the chosen subject area. You can choose as many fields as you would like to see in your report. Remember that you can always change the display order later if you create the report in an Excel format.

6. Click the fields you want included in your report. Use the Ctrl key to select more than one at a time.

7. Click the double right arrow to add the field to your report.

8. Repeat steps 6 and 7 to select all the fields for your report.

The screenshot shows the 'Select Fields to Display' dialog box. The 'Filter Criteria' tab is selected. The 'Available Display Fields' list includes: EMPLOYEE_NAME, EMPLOYEE_STATUS, EMPLOYEE_TYPE, ETHNICITY_DESCRIPTION_MILITARY, FEGLI, GENDER, GEOLOG_RCPDS, **GRADE**, RELATH_PLAN, HOME_ADDRESS_CITY, HOME_ADDRESS_STATE, HOME_ADDRESS_STREET, HOME_ADDRESS_ZIP, HOME_PHONE, IAWF_CATEGORY, IAWF_CUMULATIVE_SUSTAINED_TRAINING_HOURS, IAWF_DUTY_CODE, IAWF_DUTY_SPECIAL_CODE, IAWF_EMPLOYEE_READINESS_STATUS, IAWF_IAM_LETTER_DATE, IAWF_LEVEL, IAWF_PAA_COMPLETE_, IAWF_PQS_COMPLETE, and KEY_EMERGENCY_ESSENTIAL_POSITION. The 'Selected Display Fields' list includes: NAME_LAST, NAME_FIRST, OCCUPATIONAL_SERIES, BIN, and BSC. The '>>' button is highlighted with a red box. The 'Create Report' button is at the bottom, with 'Excel' selected.

Creating an Ad-Hoc Report

The Filter Criteria is an optional tab. You can filter on any of the available fields whether or not you chose them to be displayed in steps 6 through 8. For example, in this report we want to filter on a specific Assigned UIC even though it won't be displayed. To add a filter, choose the field to filter on, apply an operator to it, and then select one or more values of that field.

10. Choose a filter for your report as needed.
11. Choose an operator to apply to the filter.
12. Manually enter any values or click the "Select Values from TWMS" link to select the value(s).
13. Click the **Add Filter**

The screenshot displays the 'Filter Criteria' tab of the Ad-Hoc Reporter. It features a list of column names on the left, including 'UIC_ASSIGNED' which is highlighted. In the center, an operator dropdown menu is open, showing options like 'Equals', 'Greater Than', 'Less Than', 'Not Equal', and 'Like'. To the right, the 'Value(s)' field contains 'DEMO1'. An 'Add Filter' button is located to the right of the value field. Below the column list, there is a 'Create Report' button with radio buttons for 'Excel' and 'HTML'. Arrows from the numbered list point to these elements: 'UIC_ASSIGNED' (11), 'Equals' (11), 'DEMO1' (12), and 'Add Filter' (13).

Creating an Ad-Hoc Report

You can add many filter to help you retrieve exactly the information you want in your report. You can also update and delete any of the filters you have added.

14. Click the **Sort Columns** tab.

Update or delete a filter using these links.

The screenshot displays the Ad-Hoc Reporter interface with the following elements:

- Navigation Tabs:** Instructions, Employee Criteria, Display Columns, Filter Criteria, and **Sort Columns** (highlighted with a red box).
- Filter Form:** A section for adding filters with labels "Column Name", "Operator", and "Value(s)". It includes radio buttons for "and" and "or", a "Help?" link, and an "Add Filter" button.
- Filter Example:** A specific filter is shown with "UIC_ASSIGNED" as the column name, "Equals" as the operator, and "DEM01" as the value. Below the value field is a link that says "Select Values from TWMS".
- Filter Actions:** "Update" and "Delete" links are located to the right of the filter example, enclosed in a red box.
- Report Generation:** A "Create Report" button is at the bottom, with radio buttons for "Excel" (selected) and "HTML".

Creating an Ad-Hoc Report

The Sort Columns is also an optional tab. You can sort on any of the fields you already selected to display in your report. To sort on a field, choose the field then select how you want to order it. Usually you can choose either an ascending or descending order.

15. Choose a field you would like to sort for your report.

16. Click the double right arrow to add this field to sort on.

The screenshot shows the 'Sort Columns' tab in the Ad-Hoc Reporter interface. The 'Available Sort Fields' list on the left contains the following fields: NAME_LAST, NAME_FIRST, OCCUPATIONAL_SERIES, BIN, BSC, and GRADE. The 'BIN' field is highlighted with a red box. A double right arrow button is also highlighted with a red box. An arrow points from the text '15. Choose a field you would like to sort for your report.' to the 'BIN' field. Another arrow points from the text '16. Click the double right arrow to add this field to sort on.' to the double right arrow button. The 'Selected Sort Order Fields' list on the right is empty. At the bottom, there is a 'Create Report' button and radio buttons for 'Excel' and 'HTML'.

Creating an Ad-Hoc Report

You can add many fields to sort on. You can also delete any of these sort fields.

17. Choose whether you want to sort in ascending or descending order.

Delete a sort field by using this link.

18. When you are finished then you are ready to create your report. Click the **Create Report** button. The report will open in Excel by default but you can also open it as an HTML document.

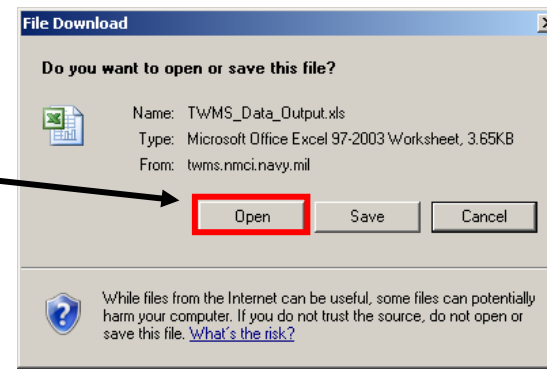
The screenshot shows the 'Select Sort Order' window with two main panels: 'Available Sort Fields' and 'Selected Sort Order Fields'. The 'Available Sort Fields' panel lists NAME_LAST, NAME_FIRST, OCCUPATIONAL_SERIES, BIN, BSC, and GRADE. The 'Selected Sort Order Fields' panel shows 'BIN' with a dropdown menu set to 'Ascending'. A 'Delete' link is visible next to 'BIN'. A '>>' button is located between the two panels. At the bottom, there are two 'Select None' links.

The screenshot shows the 'Create Report' button, which is highlighted with a red box. Below the button are two radio buttons: 'Excel' (selected) and 'HTML'.

Creating an Ad-Hoc Report

Excel will open to display your report. From here you can make additional changes and save it.

19. Click **Open** at the dialog box.



Displayed here is the Excel output of the chosen fields and in ascending BIN order. Additionally, the assigned UIC that was included as a filter resulted in listing only those employees belonging to that assigned UIC.

	A	B	C	D	E	F
1	NAME_LAST	NAME_FIRST	OCCUPATIONAL_SERIES	BIN	BSC	GRADE
2	NORMAN	RUTH	0560			11
3	ROTTEN	JOHNNY				E05
4	BRAID	JAMES				E07
5	BRUCE	JAMES				E05
6	CARSON	WILLIE				E04
7	DOUGLAS	DAVID				E05
8	KAFKA	FRANZ				
9	SOZE	KEYSER				O09
10	SWIFT	ROB				E04
11	EMELIANENKO	FEDOR				E02
12	GRACIE	RICKSON				E07
13	DRACOLYA	VLAD	5803			10
14	MERRIK	JOSEPH	2005			04
15	de NOSTRADAMUS	MICHEL	5803			10
16	MOON	SUN	5803			10
17	CAYCE	EDGAR	0343	DEMO002	80011	10
18	GERMANICUS	GAIUS	1310	DEMO104	20410	04

Saving an Ad-Hoc Report as a Template

If you are satisfied with your output you can then save this as a template to be used for future use.

20. Click the **Save as Template** link.

TWMS - Query & Reporter

USER: DEMO, MANAGER

To begin, select one of the choices below:

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☐ **Use a previously-defined template**
Use this option if you want to use an ad-hoc report you have already created and named.

Select a subject area:
Employee Information

Select a template
--- Create Query ---

Select UIC Type
☒ Use Assigned UIC ☐ Use Official UIC

[Save as Template](#)

InstructionsEmployee CriteriaDisplay ColumnsFilter CriteriaSort Columns

Available Sort Fields
NAME_LAST
NAME_FIRST
OCCUPATIONAL_SERIES
BIN
BSC
GRADE

>>

Select Sort Order
Selected Sort Order Fields
BIN Ascending [Delete](#)

Select None Select None

21. Enter the name of the template and then click **Save**.

Create Report
☒ Excel ☐ HTML

Enter Template Name: Civ-Mil, Ascending BIN [Save](#) [Cancel](#)

Saving an Ad-Hoc Report as a Template

This template has now been saved and can be used in the future.

The name of this template is now displayed and can be used to generate the same report in the future.

Feedback here lets you know your save was successful.

TWMS - Query & Reporter

USER: DEMO, MANAGER

To begin, select one of the choices below:

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☒ Use a previously-defined template
Use this option if you want to use an ad-hoc report you have already created and named.

Select a subject area:

Select ---

Select UIC Type
☒ Use Assigned UIC ☐ Use Official UIC

Save as Template

Template has been saved and named Civ-Mil, Ascending BIN

InstructionsEmployee CriteriaDisplay ColumnsFilter CriteriaSort Columns

Available Sort Fields
NAME_LAST
NAME_FIRST
OCCUPATIONAL_SERIES
BIN
BSC
GRADE

>>

Select None Select None

Select Sort Order
Selected Sort Order Fields
BIN Ascending Delete

Create Report

☒ Excel ☐ HTML

Using a Previously-defined Template

If you have already created an ad-hoc report and have saved it then it can be used again to generate the same report. You can also make changes to any of the information contained in the available tabs but keep in mind that any changes will overwrite your template. Using a template to retrieve updated information is as simple as opening the template and then clicking the “Create Report” button.

To create an ad-hoc report from a previously-defined template:

1. Click the radio button to use the templates you have already saved and named.
2. Click the dropdown arrow to choose the template you want to use.

TWMS - Query & Reporter

USER: DEMO, MANAGER

To begin, select one of the choices below:

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Use this option if you want to create an ad-hoc report that can be saved as a template for later use

☒ **Use a previously-defined template**
Use this option if you want to use an ad-hoc report you have already created and named.

Select a subject area:
---- Select ----

Select UIC Type
☒ Use Assigned UIC ☐ Use Official UIC

Select a template
---- Create Query ----
00052 Civilian Locations
Billet - Civilian by BSC
civilian bus codes
Civ-Mil_Ascending BIN
sf50 test
Training - MacDonald, Privacy

Save as Template

Using a Previously-defined Template

After selecting the template you will be taken to the Employee Criteria tab. You can make any changes you want to here or on any of the other tabs or you can click the Create Report button to open another Excel spreadsheet.

3a. Click the **Create Report** button to display any updated information based upon the criteria you selected in this template.

OR

3b. Make any changes to the template to create a different report. Remember that any changes will overwrite the original template.

The screenshot shows the 'TWMS - Query & Reporter' interface. At the top, a dark blue header contains the title. Below it, the user is identified as 'USER: DEMO, MANAGER'. A prompt 'To begin, select one of the choices below:' leads to two radio button options. The first option, 'Create an Ad-Hoc report', is unselected. The second option, 'Use a previously-defined template', is selected. Below the second option, there is a 'Select a template' dropdown menu showing 'Civ-Mil, Ascending BIN'. A 'Delete Template' link is also present. Below these options, there is a 'Select UIC Type' section with two radio buttons: 'Use Assigned UIC' (selected) and 'Use Official UIC'. A black arrow points from the 'Create Report' button in the bottom right of the 'Employee Criteria' tab to the 'Create Report' button in the bottom right of the 'Employee Criteria' tab. The 'Employee Criteria' tab is active, showing a list of employee types and statuses. The 'Employee Type' list includes 'MILITARY-ACTIVE' (checked), 'MILITARY-RESERVIST', 'MILITARY-NON-NAVY', 'CIVILIAN-AF' (checked), 'CIVILIAN-FND', 'CIVILIAN-FNI', 'CIVILIAN-NAF', 'CIVILIAN-NAF-FND', 'CIVILIAN-CONTRACTOR', and 'CIVILIAN-NON-NAVY'. The 'Employee Status' list includes 'Active - On Temp Detail/Temp Prom', 'Active - On Board', 'Active - On Deployment/TAD', 'Active - On LWOP', 'Active - On Terminal Leave', 'Inactive/Separated', 'Prospective Gain/Transfer', and 'Prospective Loss'. At the bottom of the 'Employee Criteria' tab, there are 'Check All' and 'Uncheck All' links. A red box highlights the 'Create Report' button at the bottom right of the interface.